

CORE- Mailroom OnBase Queues and Functions

Purpose:

The Operations Coordinator and/or Operations Team Lead monitor and/or work various queues within the OnBase system. They also submit and work various forms within OnBase as well. Working these queues and submitting these forms ensures that there is no impact to the day-to-day operations of the Mailroom team and that the staff has the appropriate access to various systems.

Identification of Roles:

Operations Coordinator and Operations Team Lead – performs various functions within OnBase and performs other Mailroom functions

Operations Manager – operates as a resource for Operations Coordinator and Operations Team Lead functions; implement process changes as needed

Performance Standards:

None

Path of Business Procedure:

Step 1: OnBase Queues

- a. CORE01- Claims for Resubmission
 1. Print and lay in the trays in the Mailroom
- b. CORE01- Claims for Resubmission (50+)
 1. Review document and select appropriate User Task
- c. CORE01- Special Batch
 1. Print and lay in the trays in the Mailroom
- d. CORE01- Special Batch (50+)
 1. Review document and select appropriate User Task
- e. CORE01- Capitation Form
 1. Key claim in Medicaid Management Information System (MMIS) and mark as complete
- f. CORE01- Retrieval Requests
 1. Print and give to Courier to pull
- g. CORE01- Envelope Review
 1. Review document and select appropriate User Task
- h. CORE01- Unit Lead
 1. Review document and select appropriate User Task
- i. CORE01- Generate Return To Provider (RTP) Letters

1. Monitor and notify the Systems Support team if items are accumulating
- j. CORE04- Rush Requests Scan
 1. Print claim and reprocess
- k. CORE90- Mailroom Letter Appeal (cannot be worked by Operations Coordinator)
 1. Review appeal and approve or deny
- l. Dakota Imaging (DI)- Pending Approval (cannot be worked by Operations Coordinator)
 1. Review and approve Dakota Imaging Change Request (DICR) form
- m. DI- Testing
 1. Indicate testing is complete on DICR
- n. Iowa Medicaid Enterprise (IME)- Procedure Update (cannot be worked by Operations Coordinator)
 1. Update and/or create and submit for review IME operational procedures
- o. IME- Publish (cannot be worked by Operations Coordinator)
 1. Post the updated IME operational procedure and complete
- p. IME- Core Procedure (Proc) Review (cannot be worked by Operations Coordinator)
 1. Review existing IME operational procedures
- q. Internal Check Receipt
 1. Indicate check received from another Iowa Medicaid Enterprise (IME) Unit
- r. OnBase Change Request (OBCR)- Pending Approval (cannot be worked by Operations Coordinator)
 1. Review and approve OBCR form
- s. OBCR- Testing (CORE)
 1. Indicate testing is complete on an OBCR
- t. Security Access (SA) 00- CORE Returned (cannot be worked by Operations Coordinator)
 1. Correct and resubmit Security Form

Step 2: OnBase forms

- a. Core Mailroom Quantity (Select File > New > Form in OnBase to create form)
 1. Indicate weight of mail opened by each DE/IT or DES Staff member
- b. CORE Mailroom Security Access Form (Select File > New > Form in OnBase to create form)
 1. Request, change, and delete access to the Verify system applications and Transform Manager
 2. Request auto-feed groups
 3. Raise and lower quality assurance percentages to claims in the Verify system
- c. CORE User Quality Assurance (QA) Form (Select Document Retrieval > Core document type group > Core User QA Form document type in OnBase to update form)
 1. Raise and lower quality assurance percentages on Return to Provider (RTP) letters
- d. DI Change Request (Select File > New > Form in OnBase to create form)
 1. Request a change to the Verify system
- e. OBCR form (Select File > New > Form in OnBase to create form)

1. Request a change to the OnBase system
- f. Security Form (Select File > New > Form in OnBase to create form)
 1. Request, change, and delete access to MMIS and OnBase
- g. IME Operational Procedure Request (Select File > New > Form in OnBase to create form)
 1. Request update and create IME operational procedures

Forms/Reports:

Core Mailroom Quantity form
CORE Mailroom Security Access Form
CORE User QA Form
DI Change Request form
OBCR form
Security Form
IME Operational Procedure Request

RFP References:

5.2.2.3.4.1.11 – 5.2.2.3.4.13 5.2.2.3.4.17

Interfaces:

Data Warehouse, Medical Services, Member Services, Pharmacy Medical Services, Policy, POS, Program Integrity, Provider Cost Audit, Provider Services, Revenue Collections, HIPP, HCBS

Attachments:

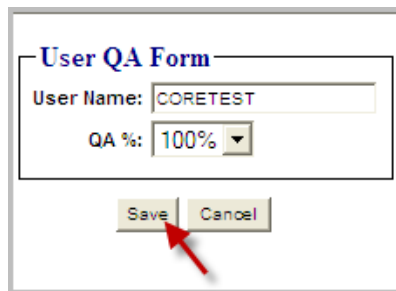
Core Mailroom Quantity form

Daily Quantity Log					
Date: 09/29/2010					
Line	User	Function	Pounds	Ounces	Quantity
1	---	FLATS/FATS			
11		TRAYS			
<div>Submit Cancel</div>					

CORE Mailroom Security Access Form

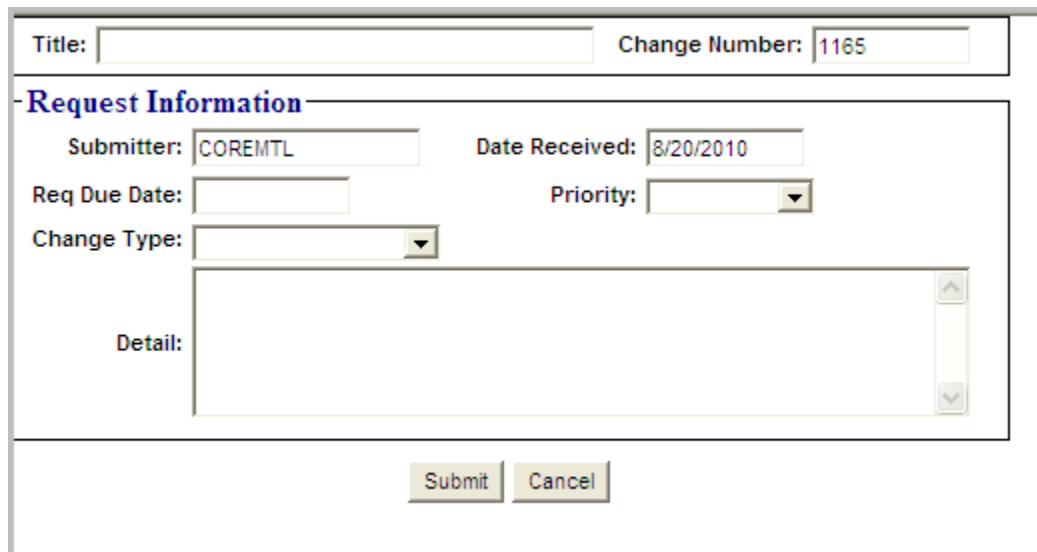
Mailroom Security Access User Form		
Reference: <input type="text"/>		
Name: <input type="text"/>		Unit: <input type="text"/>
Action		
<input type="checkbox"/> Activate New Operator	<input type="checkbox"/> Delete Access to File(s)	<input type="checkbox"/> Inactivate
<input type="checkbox"/> Activate Existing Operator	<input type="checkbox"/> Change Access to File(s)	<input type="checkbox"/> Delete
Reason for Action		
<input type="checkbox"/> New Employee/Temp	<input type="checkbox"/> Assistance from Another Unit	<input type="checkbox"/> User Modification
<input type="checkbox"/> Job Function Change	<input type="checkbox"/> Termination	<input type="checkbox"/> Change Password
Which Exchange		
<input type="checkbox"/> Exchange 7	<input type="checkbox"/> Exchange 8 (Default)	<input type="checkbox"/> Both
Dakota Imaging Applications		
<input type="checkbox"/> 1. Data Entry	<input type="checkbox"/> 9. Scanning	
<input type="checkbox"/> 2. Pre-Verification	<input type="checkbox"/> 10. Image QA	
<input type="checkbox"/> 3. Post-Verification	<input type="checkbox"/> 11. Character	
<input type="checkbox"/> 4. Classification	<input type="checkbox"/> 12. Form	
<input type="checkbox"/> 5. Indexing	<input type="checkbox"/> 13. Field	
<input type="checkbox"/> 6. Administration	<input type="checkbox"/> 14. Verify QA	
<input type="checkbox"/> 7. Rejection	<input type="checkbox"/> 15. Manual Job Selection	
<input type="checkbox"/> 8. Routing	<input type="checkbox"/> 16. Modify Verify Preferences	
Dakota Imaging Auto Feed Groups		
<u>Exchange 7</u>		<u>Exchange 8</u>
<input type="checkbox"/> Part A	<input type="checkbox"/> Dental	
<input type="checkbox"/> Part B	<input type="checkbox"/> HCFA	
<input type="checkbox"/> UB	<input type="checkbox"/> TMC	
<input type="checkbox"/> Professional Crossover	<input type="checkbox"/> All	
<input type="checkbox"/> Institutional Crossover		
<input type="checkbox"/> All		
Dakota Imaging QA Groups		
<u>Claim Type</u>	<u>Version</u>	<u>Percentage</u>
<input type="checkbox"/> HCFA	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> UB	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Dental	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> TMC	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Part A	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Part B	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Reject QA	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Professional Crossover	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Institutional Crossover	<input type="text"/>	<input type="text"/>
Transform Manager Applications		
<input type="checkbox"/> Administration	<input type="checkbox"/> Verify Operators	
<input type="checkbox"/> Quality Analyst	<input type="checkbox"/> Remove TM Access	
<input type="checkbox"/> Mailroom Support Staff		
Comments: <input type="text"/>		
Requestor: <input type="text"/>	Date: <input type="text"/>	
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>		

CORE User QA Form



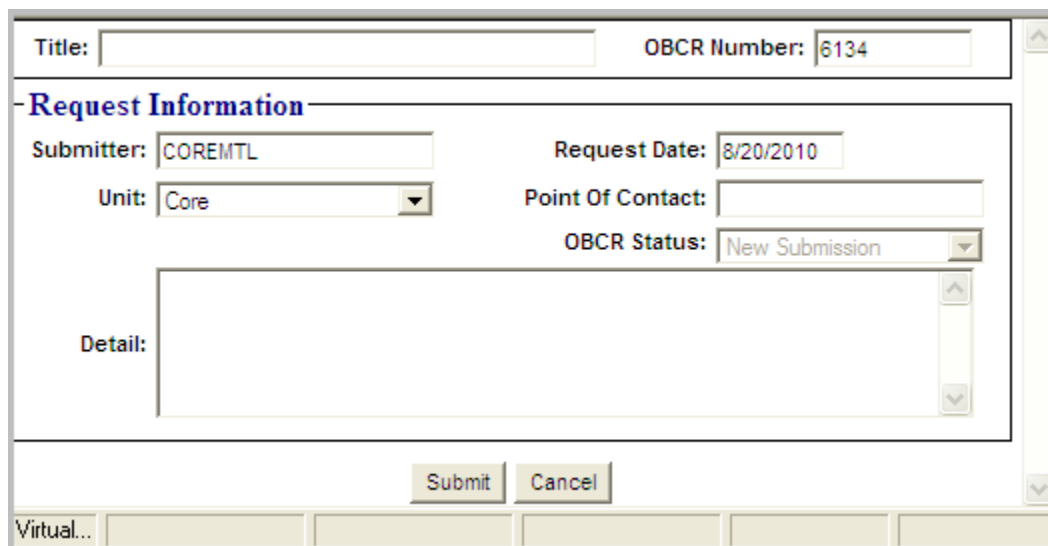
A screenshot of the 'User QA Form' window. It has a title bar and a main area with a blue header 'User QA Form'. Below the header, there are two input fields: 'User Name:' with the value 'CORETEST' and 'QA %:' with a dropdown menu showing '100%'. At the bottom, there are two buttons: 'Save' and 'Cancel'. A red arrow points to the 'Save' button.

DI Change Request form



A screenshot of the 'DI Change Request form' window. It has a title bar and a main area with a blue header 'Request Information'. Below the header, there are several input fields: 'Title:' (empty), 'Change Number:' (1165), 'Submitter:' (COREMTL), 'Date Received:' (8/20/2010), 'Req Due Date:' (empty), 'Priority:' (dropdown menu), and 'Change Type:' (dropdown menu). Below these fields is a large text area labeled 'Detail:'. At the bottom, there are two buttons: 'Submit' and 'Cancel'.

OBCR form



A screenshot of the 'OBCR form' window. It has a title bar and a main area with a blue header 'Request Information'. Below the header, there are several input fields: 'Title:' (empty), 'OBCR Number:' (6134), 'Submitter:' (COREMTL), 'Request Date:' (8/20/2010), 'Unit:' (Core), 'Point Of Contact:' (empty), 'OBCR Status:' (New Submission), and a large text area labeled 'Detail:'. At the bottom, there are two buttons: 'Submit' and 'Cancel'. Below the buttons, there is a row of five buttons, the first of which is labeled 'Virtual...'. The window also has a vertical scrollbar on the right side.

Security Form

Security Access User Form	
Name: <input type="text"/>	Unit: <input type="text"/>
Mother's Maiden Name: <input type="text"/>	Job Title: <input type="text"/>
Last 4 Digits of SSN: <input type="text"/>	
MMIS User ID: <input type="text"/>	OnBase User ID: <input type="text"/>
State Network Login: <input type="text"/>	
Reason for Change	
<input type="radio"/> Deactivation <input type="radio"/> New Employee <input type="radio"/> Job Function Change <input type="radio"/> Name Change	
This request pertains to the following system(s): MMIS <input type="checkbox"/> OnBase <input type="checkbox"/>	
Tracking & Approval	
Requested By: <input type="text"/>	Date: <input type="text" value="9/29/2010"/>
Unit Manager: <input type="text"/>	Date: <input type="text"/>
Core Unit Manager: <input type="text"/>	Date: <input type="text"/>
Core Security Admin: <input type="text"/>	Date: <input type="text"/>
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

IME Operational Procedure Request

Operational Procedure Change Management

Request Type: ☐ New ☐ Update ☐ Deactivate

Requestor: Request Date:

Request:

Explanation:

Does this change impact any other customers (business unit, provider community, member community, other DHS groups)? ☐ Yes ☐ No